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ABSTRACT

Guidelines designed to be used in planning non-degree courses in information science and services are described. Courses referred to would contribute to improvement of the role and place of information professionals, information work, and information science in servicing personnel in scientific and technical fields, particularly in developing countries. The needs and interests of different audiences will determine important choices referred to in the guidelines. Checklists to verify the completeness of the plan and to suggest means for evaluating the experience are included. Sections cover planning, organizing, implementing, and evaluating the course. Sample course announcements, application forms, activities and time tables, participant evaluation report, budget/financial report, and checklists are appended. (Author/KP)

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GUIDELINES FOR THE ORGANIZATION OF TRAINING COURSES, WORKSHOPS AND SEMINARS IN SCIENTIFIC AND TECHNICAL INFORMATION AND DOCUMENTATION

ED145848

Prepared under contract for Unesco
by Professor Pauline Atherton

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PREFACE

A course is instructional in nature, as opposed to a conference, meeting or symposium, which is informative, and more of an interactive meeting of like and equal minds. Symposia, strictly speaking, are not courses, but the term is loosely used in the information/library field.

The courses referred to here generally would not lead to a degree, diploma, or other recognized qualification, but would contribute to an improvement of the rôle and place of information professionals, information work, and information science in serving the personnel in scientific and technologic fields in developing countries where there is a serious lack of specialized manpower.

The workshop, seminar, or course, as a medium of communication, as a setting for problem solving, decision making, planning, and idea sharing, is a major activity in education, as well as in business and industry. It can be an important aspect in the development of the information profession in any country.

Training courses, seminars, and workshops can serve several purposes. Courses can indicate different ways of solving problems and provide new information, new methods, new ideas, and different points of view. Courses can provide opportunities for participants to exchange knowledge and attitudes gained from actual experience. Meeting together, people with common goals can decide on joint programs of action.

A course, or workshop, must be planned and programed if it is to be successful - both to the planners and to the participants.

A successful course can be likened to an iceberg - three fourths of it below the surface. The one fourth that does show is too often taken for the whole iceberg. The unseen three fourths (planning, organizing and evaluating) are generally more important in the long run.

These guidelines were prepared under contract for Unesco by Professor Pauline Atherton, School of Library Science, Syracuse University (U.S.A.). They are divided into four sections and are designed to be used in planning several types of courses in information science and services. The needs and interests of different audiences must be kept in mind, as they will determine important choices referred to in these guidelines. For example, users of information, information professionnals, and teachers will require different course content, learning activities, and arrangements. It is neither our intent to direct the reader to use specific formats for courses nor to specify the content. The purpose of these few pages is to guide the reader through the process of course planning, with checklists along the way to verify the completeness of the plan, and to suggest means for evaluation of the experience.* In some sections specific suggestions are offered whichmay or may not apply to the situation or course the reader has in mind. Determining course objectives early in the planning will aid the planner in choosing among these suggestions.

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* For a methodology of evaluating these courses, the reader is invited to consult : "UNISIST Guidelines for the Evaluation of Training Courses, Workshops and Seminars in Scientific and Technical Information and Documentation", Paris, Unesco, 1975.

The draft of these guidelines was reviewed by more than fifteen experts, some from developing countries and others with experience in teaching courses in this area in developing countries. Appreciation is expressed for their helpful comments.

Several pertinent texts were reviewed and proved very helpful in shaping the format and content of these guidelines. They are listed below :

American Express. Meeting Planners 100 Point Checklist. March 1974. 2 p.

Conroy, Barbara. Staff Development and Continuing Education Programs for Library Personnel : Guidelines and Criteria. Boulder, Colo, Western Interstate Commission for Higher Education, January 1974. $1.00, 23 p. with bibliography.

Medical Library Association. A Checklist for Planning and Teaching MLA Continuing Education Courses. (In press, 1975).

National School Public Relations Association. The Conference Planner, Aguide to Good Education Meetings. Washington, D.C., National Education Association, 1967.

Organizing Schools and Institutes of Public Administration ; A Handbook on Planning, Improving, and Managing Centers of Education, Research and Advisory Services in Public and Development Administration. Pittsburgh, Pa., Univ. of Pittsburgh, Graduate School of Public and International Affairs.

Planning of International Meetings. Oxford, England, Blackwell Scientific Publications. 113 p.
A Handbook issued by the Council for International Organizations of Medical Sciences established under the joint auspices of UNESCO and WHO.

Slater, Margaret. Short Course Provision in Information/Library Work and Computer Appreciation. Aslib, September 1972. 41 p.

INTRODUCTION

Before stating the guidelines, it might be well to describe and discuss the critical tasks in the organization and conduct of non-degree training courses, seminars, and workshops which may be full-time and part-time, special or recurring, periodic, ad hoc, irregular or repeated regularly. The tasks discussed below reflect the tasks involved in in-service, non-degree professional training work for the information professional as well as courses designed for users of information services. Suggestions or examples included here are not meant as directives but as illustrations. Each task will be analyzed in the following four sections.

Critical Task #1: A course "style" must be chosen.

Assuming the topic or subject has been chosen, numerous alternatives are available in determining what kind of courses will meet best a specific need. For example:

(1) A special course offered after work hours, apart from the normal academic curriculum, to serve government employees or the staff of a particular information center.

(2) A full-time course of a few months duration to provide a broad background in documentation, library administration and/or allied fields.

(3) Assignment of an instructional staff, on a temporary loan basis, to an agency to assist in its in-service training program.

(4) A short full-time course, with duration from a week to two or three months, to provide

intensive preparation for a limited area, or for a specialized group.

(5) Technique or problem-oriented workshops of several days to a few weeks duration to develop very specific competencies or skills in some aspect of administration, program management, procedure, or service. (Can be a useful method for users of information services as well.)

(6) Part-time training sessions one, two, or three afternoons or evenings per week, or one full day each week.

(7) Senior level seminars for top administrative officials, managers, or other homogeneous groups to update them on new concepts of information service, administration, administrative requisites for economic and social development, strategy of administrative improvement and reform, or other important subjects.

(8) Training course of a half-day or more in length, for groups to orient a group to new ideas, approaches, or methods and to stimulate their application.

(9) Short seminars to provide a forum for persons with common professional interests, enabling them to exchange experiences, secure new concepts, learn of significant achievements with new methods, and to promote higher standards of professional conduct.

Critical Task #2: The instructional methods used must be appropriate to the course style.

The most effective method of instruction for a specific course varies according to the kind of training project, its precise purpose, and its clientele.

(1) The methods utilized in non-degree training should stress applied aspects - how to relate theory, processes, and techniques to practical situations.

(2) Unless the purpose of the course or seminar is to teach only techniques or skills, most of the instruction should be problem-oriented. The problems might relate to policies, substantive

program issues, organization, management, or use of new technologies.

(3) This orientation indicates that the instructor should place heavy reliance on problems suggested by the participants, usually those arising in their own agencies, as well as on specially developed simulations, cases, problem descriptions, etc.

(4) Instructional materials must be relevant to the environmental situation and preferably also to the participants' organization.

(5) Participative instructional methods are usually essential. To be avoided are lengthy lectures, talking at or down to the participants, generalized discussion, elaboration of descriptive materials, and student memorizing of information.

(6) Thus, the use of simulated problems, role-playing, case study, critical incident analysis, techniques for analyzing and developing solutions to real problems should be the principal methods utilized. But all of these tools and techniques should be carefully selected, skillfully used, and adapted to the course and clientele.

(7) Courses for high-level officiers seldom should include technical skill training, as contrasted with administrative skills, except to demonstrate skill competencies needed by their employees. On the other hand, courses for employees at lower levels and in technical fields often will stress skill development.

Critical Task #3: The course must be planned with an agency responsible for manpower planning to insure that it will fulfill an identified need.

Within a company, priorities for in-service training will have to be met. Because few course planners have developed well thought-out training plans or have much insight about the role of training, a professional society or training group usually will be in the position of responding

to ad hoc requests or initiating them. Senior level officials may discover that some element of its operations is floundering. The problem may be ineffective execution of projects, failure to have library material and services available when needed, inadequate budgetary procedures, poor management, or some other common difficulty. Similarly, new leadership may decide to improve its administration, and thus realize that further training for its staff is essential. Any and all of these demands for courses must be screened carefully to insure that the course planned will meet the need.

(1) The group planning the course must determine what kind of course would best fulfill an identified need, and how the anticipated results might compare with those of alternative undertakings.

(2) In some situations, planning groups must exercise great initiative to interest government in training and to secure support for suggested courses. Alert training officers will have intimate contact with government agencies and will foster the projects showing special promise.

(3) The potential contribution of the training proposal to improving information services of the country and to accelerating its economic and social development is an important factor.

(4) It is especially desirable to work with an agency that is both progressive and ready to make a major thrust for improving administration of information services.

Critical Task #4: The course prospectus must attract participants and be a clear description of the course.

Essential for each training project is a statement or prospectus that describes in clear and specific terms its

purpose, scope, method, conditions for admission, arrangements, obligations, and other salient facts.

The prospectus is indispensable in creating understanding by government, the sponsor, the participants, and the staff regarding objectives and the obligations of the parties involved. It provides a basis for approval of the project by any final authority.

Reproduction of this prospectus, or a popular version of it, provides a brochure for distribution among the officials responsible for selecting the participants and for distribution also among prospective participants. By stating clearly the time, place, and duration of the course; who is eligible; how to file an application for admission; and details on costs, it can help avoid confusion. The prospectus should clearly identify the level of the subject matter to permit the selection of participants with comparable competencies and minimize anxieties about ability to succeed in the course. The prospectus should avoid vague generalities, such as "improving information services", and should clearly describe the potential value to participants. For example, a three-day seminar for library heads might have as its objective, "appreciation of the programing and budgeting process to gain better understanding of its potential use in planning and finance, and in control of operations".

Critical Task #5: Selection of participants is as important as choice of instructional method.

Sustained effort and resourcefulness to enroll a homogeneous group of participants will contribute greatly to the success of a course. The group planning the course must devote much time and effort to arranging for the nomination and/or screening of applicants. In addition to the wide circulation of the prospectus, arrangements could be made for:

(1) Organizations to nominate participants with a liaison officer or committee formed for proposing nominees.

(2) If an in-service course, directives by the chief executive, or other central officer, could state quotas and conditions for making nominations.

(3) Persons nominating participants should be instructed that their nominees must meet minimum qualification standards such as maturity, knowledge, experience, and language skills.

If the planners for the course are responsible for recruiting participants by canvassing interest among many prospects, assigning the task of screening to themselves or another group is extremely important. If necessary, pretests in language ability or other skills may have to be devised.

The number of manageable participants varies according to the purpose and level of the course and to the teaching methods employed. Fifteen to twenty-five enrollees is the feasible, effective range; a class of twenty-five, at the most, is the maximum that can be managed in a training project that emphasizes participative methodologies. In a

class of senior personnel or in any advanced course that entails a high degree of participation, the figure ordinarily would not exceed fifteen. If the program is to be primarily of the information-giving type using primarily the lecture method, fifty or more persons might be enrolled in a single course.

Critical Task #6: The successful conduct of the course depends on the instructor and the types of materials and assignments chosen.

"Best" practice may vary. Listed below are several examples.

(1) In a very short or part-time training project, a chief instructor may give most of the instruction.

(2) In courses of longer duration or greater diversity of subjects, numerous instructors will need to be utilized. The more specialized the curriculum, the greater the use of experts in the subject matter.

(3) Instructors selected sufficiently in advance of the course's start become thoroughly familiar with the background of the participants, and can prepare their handout materials.

(4) An instructor, if encouraged and assisted, can use appropriate audio-visual materials and other teaching aids such as films, slides, charts, transparencies for an overhead projector, maps, flannelboard materials, tape recorders, and record players.

(5) In senior seminars, participants bring a wealth of experience and knowledge, which an alert instructor can draw upon in class discussions. Descriptive statements and case problems prepared by participants and given to instructors can help relate class sessions to the interests of the participants.

(6) As a course proceeds with a variety of instructors, each new instructor upon entry is fully informed

about the material covered by his predecessors. The chief instructor present in class sessions helps integrate. A new instructor reviews his plans with his predecessors to prevent duplication and to ensure that his material will be fully coordinated with the course as a whole. The chief instructor schedules class sessions to integrate the various parts of the curriculum.

(7) Frequent "change of pace" is used in sessions that continue for several hours during a day. Varied use of teaching methods, introduction of new problems, assignment to individual or group reports, and use of films or other visual materials helps to maintain interest. A scheduled time for reading handout material and working on individual or group projects provides the needed change.

(8) A good instructor injects spirit into his teaching and promotes such stimulation and interchange that an inquiring attitude is engendered. He regards himself as a catalyst to learning, free communications, and goodwill.

(9) Field visits to pertinent projects, installations, or government agencies have substantial value. Advance arrangements are made to ensure that the participants will be instructed in matters of maximum benefit to them, not just given a tour.

Critical Task #7: Meeting room arrangements must be optimum.

A sensitivity to the importance of certain requirements will insure a successful course. Good ventilation, light, freedom from distracting noise, comfortable temperatures, and pleasing or relaxing wall colors are necessary. Chairs should be comfortable with some cushioning - not so soft as to induce sleep and not so hard as to distract attention. Standard equipment items include: a blackboard covering a large part of a wall and a second blackboard, attached or movable; an easel for visual aids and

blank flip sheets (with colored markers); slide and film projectors, and screens.

Critical Task #8: Coordination and follow-up with government agencies and supervisors of participants are essential in the planning stage, during the course, and after it has been evaluated.

A group responsible for courses should maintain liaison with planning offices as well as with central and departmental administrative officials known to be responsible for manpower planning in a country. Government officials should be informed of progress, given an opportunity to participate in events, and informed of the project's outcome.

Views differ as to whether a written evaluation of each participant's performance should be provided to his supervisor. In any event, the course director could keep a record on each participant, including evaluations by his instructor.

The participants' supervisors require separate attention to enlist sympathetic support to the training effort and to encourage participants to apply their new knowledge and skills. This objective may be facilitated by providing supervisors with the syllabus and prospectus before the course begins, and by collectively meeting with the director for consideration of the course, what it should accomplish, and the course content. This type of meeting has training value for the supervisors. If a meeting is not feasible, consultations may need to be held with the supervisors

individually. A written resume at the conclusion of the course can be transmitted to superiors.

Course directors have found it useful to consult superiors about six to nine months following the end of a project as part of evaluation of results and to encourage supervisory initiative in achieving high performance by the participants. This follow-up procedure emphasizes the necessity of providing training projects at all levels: senior, middle management, lower supervisory, and for specialized professional services.

Critical Task #9: Evaluation of participants should be made during, at the end, and several months after completion of the course.

The participant's progress should be monitored to get useful evidence of progress during the course and immediately after. Within three to nine months after completion of the project, a follow-up review can also be made to ascertain its impact. If a checklist is used to ascertain what elements of the course were found to be of significant value by the participants after their return to active service, it should be cleared with the superior officials, because some might resent the intrusion or feel threatened by its use. An inquiry could also be sent to the supervisors to obtain their views on how the participants benefited.

In the following four sections of these guidelines, these tasks will be itemized in more detail under four major

areas:

I. Planning and Preliminaries

II. Organizing for the Course

III. Implementing the Course

IV. Evaluating the Course and Other Post-Course Activities

Each section ends with a checklist of questions for the course director.

SECTION I. PLANNING AND PRELIMINARIES

Planning is a process in which the present situation is carefully examined and preparation is made for changing the situation. The success of any course depends to a great extent on the soundness of the planning for the course. Risk of failure is tremendously reduced if parts of the planning process include individuals to be affected by the course - those who may participate in it, those who will be responsible for implementing it, and in some cases, those who will be users of the products or services which are likely to be affected as a result of the course.

GUIDELINE 1: Information about needs for course must be gathered and analyzed.

"Needs" can be defined as the gap between the present level and desired (or required) level of ability of individuals or of the organization (i.e., library, information center, agency, etc.) in meeting its responsibilities.

Needs can be defined in terms of the lack of essential knowledge, skills or attitude which prevents persons from giving satisfactory job performance or which interferes with their potential for assuming greater responsibilities.

Needs can be defined in terms of organizational elements which function ineffectively or without needed coordination. In some cases, a program of staff development is a deliberate effort to effect planned organizational change and thus is a part of future developments.

Needs can be defined in terms of the needs of the community to which the institution is responsible - the company, the university, the state, the profession.

All possible sources of information should be considered in determining what the problem and needs are. Several means of gathering this information should be combined to assure accuracy and comprehensiveness. Selection of which methods would be most appropriate would depend on the individual situation.

Classification of the gathered information will aid interpretation and evaluation. Sample categories into which information about training needs often falls include:

individual/organizational needs
knowledge/skill/attitude needs
long-term/short-term needs
needs for individual or group activities
needs for formal or informal activities
needs requiring internal/external resources

A careful and realistic analysis of the information is important and needs to consider as many factors as possible. The analysis should include the setting of priorities since not all needs found can be met.

GUIDELINE 2: Course objectives must be formulated.

Sound objectives provide a firm basis for the decisions - course planning, setting policies and procedures, evaluating the outcomes - that will be necessary at each stage of the course.

Objectives should be clear, concise, specific statements with no possible misunderstanding of intent. Usual

statements such as "to improve performance" are vague and do not provide an adequate base on which to develop a course.

Course objectives should specify the desired outcomes that are sought as results. For example:

> Public service librarians will be able to respond more effectively to patrons asking reference questions through more adequate reference interview techniques and greater awareness of available resources (materials and people).

Once the course objectives are formulated the choice of type of course, instructional method, and intended audience will all fall into place.

GUIDELINE 3: Resources needed must be assessed.

The kinds of resources usually needed for a course include physical facilities, equipments, supplies, materials, funds, and most important of all, people. Those resources already available can be an important factor in planning the program but should not eliminate alternatives for which resources are not immediately available.

Needed resources should be reviewed with an indication of which are presently available and which are not presently available. Initial exploration should be made to discover those resources needed but not presently available and to determine how they might be obtained.

A tentative budget would include such costs as printing, postage, telephone, supplies, travel expenses for planning committee and instructors, honoraria, rental fees for facilities and equipment, supplies for participants,

meal charges (if any), translation or interpretation services. Once the course program is completed, and the number of instructors and participants verified, the budget can be itemized and totaled, and fees assessed to cover the costs or a subsidy obtained from a sponsor. (See Appendix E.)

GUIDELINE 4. The Organizing Committee must be appointed.

The person or group who had the original idea for the course may or may not help to form the official Organizing Committee for the course. Persons on such a committee will normally have some special abilities or experience in the details of course management (such as registration, publicity, evaluation). Also, persons who are the accepted representatives of the group which hopes to benefit from the course should be appointed.

Functions to be performed by such a group include those enumerated below and itemized in the checklists which follow Sections I and II, especially, but their stewardship during the entire course and afterward is of paramount importance.

GUIDELINE 5: Sponsorship must be attained.

Sponsorship is important to insure acceptance by those with responsibility for manpower training in developing countries. International agencies such as UNESCO and OECD and national organizations such as the professional information society in a country are most interested in sponsoring worthwhile educational projects because a future with

improved information services and systems depends on a better trained information professional and a better informed information user. Contacting these agencies or the leading educational institutions in a country will insure a better course plan and a more coordinated approach to the needs for education in a country.

GUIDELINE 6. An action plan for the course must be designed.

This action plan, though planned and stated, should be flexible to adjust to unusual circumstances, requests of sponsors, and the reactions from the participants or the organizations they represent. Planning is often difficult, even though a common-sense process. Most individuals are impatient to get to the doing. Nevertheless, time spent in designing the action plan assures that all critical decisions have been made.

Such an action plan would include a list of several decisions needing action, even though these decisions are seen as tentative and must be reviewed later. For example:

1) Language of instruction
2) Scope and level of course content
3) Length of course
4) Time of year for course
5) Place for course sessions
6) Place for lodging and meals
7) Pre-course distribution of learning materials
8) Selection of groupings for course sessions (See below for discussion.)

9) Choice of instructor(s) and other resource persons

10) Equipment and other facilities required

11) Plan for monitoring course's progress and participant satisfaction

12) Time sequence for publicity, course prospectus (with application) choice of participants, collection of registration information, post-course publicity

13) Budget and amount of funds to be raised by grant, subsidy, or fees (See Appendix for possible items to be included.)

14) Maximum number of participants; their specified qualifications (if any)

Courses have a variety of possible groupings and planners must decide which to use at which time in the course. Here is a summary of the types of groupings available and how each may best be used:

	Groupings	Kind of Subject Matter	Group or Number of Participants
(1)	General sessions	Information giving Orientation Reporting to total group Demonstrations Lectures	Total group
(2)	Work groups	Working on a problem or aspect of a problem, to come up with action or finding; report usually expected; may meet once or several times	Usually not more than 10 or 20, to allow maximum participation; group composed heterogeneously
(3)	Special interest groups	Composed around common interests or common back-home jobs; exchange of opinions, experiences, ideas; usually no action required although finding may be produced	10 to 20 to allow for maximum participation
(4)	Occupational groups	Special interest groups built around jobs of the members	

	Groupings	Kind of Subject Matter	Group or Number of Participants
(5)	Application groups	Designed to apply new learnings or information received to other situations of members	To 15
(6)	Skill practice groups	Designed to give members practice opportunities in subjects being studied (indexing, leadership training)	12 to 18
(7)	Training group or process group	Specialized form used in some human relations workshops, where subject is study of group process and behavior in groups	12 to 20
(8)	Off-the-record groups	Small groups designed to give participants opportunities to react to the course; may become informal channel to staff for suggestions	5 to 10
(9)	Orientation groups	Small groups that meet once at beginning of course for introduction and orientation	5 to 10

Once the Organizing Committee has agreed upon the basic form or combinations of groupings for the course and the basic program has been determined, the next step is to analyze each session of the course.

If a summary session is to be presented at the end, it should not be at the end of a long, hard day for it may fall on deaf ears. The listener's ear can absorb only so much in one day. It might be wiser also to allow participants to eat lunch on their own, rather than schedule a luncheon, complete with speaker.

Planners must consider the audience's attitude toward each subject, the fatigue factor, the relationship to other

subjects in the course, the kind of resources required, and the method of presentation chosen.

When scheduling the elements in the course, these questions could be asked:

Where will this best fit - morning? afternoon?
How interested is the audience in this subject?
How important is this subject to the participants?
How does this tie in with the objectives of the course?
How familiar is the audience with the subject?
What is the participant's attitude toward the subject?
How much participation do you anticipate?
Would this be handled better in a general session or a small group? Why?
If in small groups, should they be composed of participants from similar back-home situations or should each group be mixed? Why?
What kinds of resource persons or materials will be necessary for this subject? In general session? In small groups?

There is no single "right" way to present any subject. The method of presentation depends upon the nature of the material and the situation in which it is being presented.

For large, general sessions, planners must determine which of several large meeting presentation methods will be most effective.

For small, face-to-face groups, the decision about which method to use depends upon how much information needs to be presented by the teacher or resource person in relation to the discussion time of participants.

Methods of presentation in general sessions include:

<u>Speaker</u> (unassisted, no visual aids)

Most appropriate for lecture, personal experience, inspirational, information-giving

<u>Speaker with visuals</u>

Describing technical subject, training, discussing complex subject, dealing with controversial matter

Demonstration

Demonstrating ideas, equipment, processes, a procedure

Situation demonstration

Demonstrating behavior (for example: leading a discussion, handling an interview)

Dramatic action

A skit or stunt designed to dramatize a point of view

Panel, symposium, debate or forum

Presentation of different points of view on subject. Panel has interaction among members. In a symposium, each person takes part of the subject and talks to or through a chairman. The forum period is interaction with members of the audience.

Once the method of presentation for each part of the course has been determined, the resource people required in each grouping must be planned. Resource persons include:

- Speakers/Teachers
- Panel chairman (for planning presentation as well as for program)
- Panel members
- Content of subject-matter resource persons (for small groups)
- Discussion leaders
- Recorders (to record small-group discussions)
- Reporters (to report the discussion - this may be a job for recorders)
- Group observers (where observation of the group's work is desired)
- Session developers (to help create a particular session, program or agenda)
- Unit heads (in large training meetings: examples - coordinator of general sessions, coordinator of skill practice sessions, work group coordinator)
- Section chairmen (for special interest meetings, may also be discussion leaders)

These are all resource people for the program itself. They do not include the staff who will handle registration or physical arrangements or hospitality. Planners should keep the two types of functions separated in their planning,

even though frequently the same person may be involved in several functions in each category.

The following list of questions should help you review the complex process involved in designing an action plan.

SECTION I. Checklist for Organizing Committee

1. ☐ Have you written a preliminary statement of objectives?
2. ☐ Have you set preliminary dates for meeting?
3. ☐ Have you determined what type of course and how many people will attend?
4. ☐ Have you estimated budget? (See Appendix for possible items to be included.)
5. ☐ Have you attained sponsorship?
6. ☐ Have you tentatively decided on a meeting site?
7. ☐ Have you assessed appropriations of facilities and availability of equipment at meeting site?
8. ☐ Have you listed the sequence and the subjects to be covered in course?
9. ☐ Have you chosen instructor(s)? Other resource personnel, such as discussion leaders? recorders?
10. ☐ Have you determined qualifications of participants?
11. ☐ Have you decided on language of instruction and length of course?
12. ☐ Do you have an overall action plan and schedule of events from this point onward?

SECTION II. ORGANIZING FOR THE COURSE

Decisions concerning the who, what and how of the implementation of the course should largely be determined on the basis of what is best in terms of fulfilling the objectives. The Organizing Committee and especially the Course Coordinator, a single individual, will have to make several decisions before the instructors and participants appear on the scene. During this phase it is possible that there will be a need for redefinition of an original objective or some adjustment of the original plans. Certain basic elements are outlined in this section in order to point up the importance of the assignment of responsibilities, selection of participants and training staff, and the assembly of resources to enable maximum learning.

GUIDELINE 7: Administrative responsibilities must be assigned and a Secretariat formed.

The management and coordination of the course should be an assigned responsibility of an individual or a group forming a secretariat, from within the agency for which the course has been designed. If the course is being held under national auspices, someone from the government agency most directly involved, or an information professional active in the professional society, should be appointed. If at all possible, someone at the proposed site for the course should be assigned to the Secretariat formed by the Organizing Committee as their familiarity with the available facilities, potential resources and staff is invaluable.

This Secretariat staff would be primarily responsible for maintenance of necessary records (personnel, financial, etc.), production and distribution of program materials, communications of the purpose and nature of the course, establishment of the sequence of activities in the course, with details about time and procedures. Tasks relating to physical facilities for course sessions, meals, lodging, etc. must also be decided, a mechanism for implementing this must be designed.

GUIDELINE 8: Course announcement must be drafted and distributed.

Too often well planned courses fail to draw the anticipated number of participants because planners neglect to make the advanced information as clear, attractive, and interesting as the course is to be. A promotion and publicity person should be assigned the task of preparing such an announcement. Hopefully this person will have had some experience at writing press releases. This first announcment must be audience-oriented, not message-oriented. It should answer such questions as What is in this course for me? How will the course meet my needs? What can I hope to gain by attending this course? Will it benefit me personally and on the job? Why is this particular course better than another course I could attend? Is there anything different, unusual, exciting in this course? Who else will be coming - people in job capacities similar to my own?

It costs very little more to use colored paper stock or colored ink in printing an announcement. It will stand

out much better than the typical, dull piece of plain white paper with too much information crammed on both sides.

If members of the Organizing Committee consist of individuals who represent the potential audience for the course, they might send a personal letter encouraging attendance to the persons who they feel should be potential participants. There is nothing like the personal touch to get results.

This first announcement, if at all possible, should answer the following questions:

Who planned the meeting? Who is sponsoring the meeting?

What is the course all about? What is the topic? What is the purpose of the course? What is unusual about the course? Why is this course being held?

Who will be attending? Who is on the program?

What is the time and date of the course?

Where will the course be held?

Are there any financial considerations?

Several samples of course announcements are included as an appendix to these guidelines.

The distribution of this announcement should be as wide as possible unless a very special group is the target audience.

GUIDELINE 9: <u>Training staff must be selected and organized.</u>

Training staff might include two different categories of expertise:

content resource - persons with competency in specific areas of knowledge or technical skills such as knowledge of systems management or a new indexing method.

methods resource - persons with ability to design a wide range of educational activities which promote learning in accord with the established objectives.

Utilization of outside staff resources, for example, from another country, on a temporary basis may offer the advantage of professional competence, but it is accompanied with the disadvantage of absence from the country during follow-up activities. Cooperative arrangements which last over a longer period of time than the course scheduled may be the most successful arrangement. Multilateral technical cooperation agencies (such as UNESCO, OECD, FAO, UNIDO), can be helpful in finding staff for such courses. Organizations in the information field (FID, IFLA, IFIPS, ASIS, Aslib and many others) maintain rosters of personnel who have had experience or are interested in teaching such courses in developing countries.

Teachers and other resource staff must be briefed as early as possible so that they will become a part of the "course team" rather than "visiting lecturers".

Teachers should be given all the basic information about the course:

Time, date and place of meeting

Nature and purpose of the meeting

How many persons will be there (with a profile of characteristics which relate to course, e.g. language proficiency, work experiences, educational background)

The nature of the sponsoring organization

The local conditions on libraries and information centers

The subject to cover, at what level of depth

Length of presentation, and what follows it

When the teacher should arrive and when he will teach

What the Organizing Committee hopes will come from his presentation of value to personnel in developing countries

Why the teacher is considered an appropriate person for this course

Agreement on fee or honorarium and expenses

Travel arrangements, weather conditions, suitable clothing

In return the teacher should be asked to provide such information as:

Name, title and present profession

Biographical and background information that shows qualifications for teaching the course

Travel arrangements (Is spouse to accompany?)

Should arrangements be made to meet at the airport or train station?

Photograph, if needed for press and/or printed publicity

Outline of course topics and method of presentation

Need for special equipment or room setup or preparation of learning materials such as transparencies for overhead projector

Language difficulty (if any) - (Self-learning language materials may have to be provided if teacher and participants do not speak same language.)

Arrangements for preparation of materials beforehand or on the spot during the course.

Follow-up letters prior to course which might include:
- A reminder of time, date and place of meeting
- An invitation to come several days in advance to tour libraries and other agencies
- Confirmation of transportation and housing arrangements

Directions to location of the site, or information about meeting time and place
Appropriate information about country (if teacher is a foreign expert)
A copy of the course description with arrangements for last minute adjustments
Report on advance attendance, if possible
Confirmation about arrangements for audiovisual equipment, other aids, or special setup
Request a copy of manuscript, if any, for publication

Just as teachers and other resource people must be trained or briefed, so must the administrative staff be trained if the course is to operate smoothly and meet the objectives established.

The staff should meet together for a review and explanation of each member's role in the coming course. The coordinator can then explain the purposes and objectives of the course, discuss the schedule, and go over the necessary details. Individuals who have responsibilities for particular elements can meet with their own staff for final briefing.

GUIDELINE 10: Participants must be screened and accepted.

The participants should be selected for the course on the basis of the identified needs from which the course objectives were developed. If, for example, a course were designed to bring experienced information workers or top administrators up-to-date on the latest developments in information retrieval systems, it would be a mistake to accept as a participant in such a course a new, inexperienced information professional. If the topic of the course were to cover some technical concepts and the lecturer chosen was one who spoke only English, it would be a disaster to accept participants who were both

inexperienced and not fluent in English. No translation or interpretation service could overcome those barriers to the learning process.

An application form (such as that shown in Appendix B of these guidelines) would be extremely helpful for screening applications. A formal committee should be established to do the screening. The members should be briefed about the pre-requisite skills of potential participants. The time schedule for this screening and acceptance procedure should be worked out well in advance so that the applicants have time to apply and receive their acceptance notice and make the necessary travel arrangements to attend the course. This process will normally take four to six months. If travel tickets are to be arranged by the Organizing Committee every effort should be made to have the ticket sent to the participant at least one month in advance of course beginning.

GUIDELINE 11: Availability of adequate facilities and the required equipment must be determined.

Since individuals learn in different ways, the pattern of activities and events, resources and methods need to be varied, all working toward the objectives of the course.

The design of course activities and the facilities and equipment used should reflect an awareness and understanding of the basic facts that pertain to the adults as a learner. An adult learner is a responsible, self-directing, independent personality, one who has learned from past education and

experience and who is presently concerned with the situations and problems in his world.

Utilization of existing materials (prepackaged learning programs, texts, films, videotapes) should be screened for usefulness in the particular course being planned, with the particular audience expected.

It is important that the supportive elements (facilities and equipment, comfortable setting, learning materials, etc.) be carefully coordinated and creatively used by the teaching staff to enhance the learning opportunities being developed in the course.

The teaching staff (teachers and other resource personnel) should be primarily responsible for the selection of materials and equipment and for setting the criteria for the selection of facilities.

The administrative staff should be primarily responsible for providing and distributing materials or equipment as needed and for arranging facilities as required.

Materials is a very broad term used here to include audiovisual aids, handouts, textbooks, films, case studies, printed explanatory materials, etc. They should be clear and understandable to the learner, directly relating to his needs and to the nature of the course. They can be used before, during or after specific course activities.

Facilities should be selected which are conducive to the kind of learning activities to be conducted. Traditional methods (lectures, demonstrations, film) might use a typical classroom format. Informal methods (small group discussion,

role playing) would require movable furniture. Tours, equipment demonstrations and specialized resources might require the group moving to the site of the resource.

The timing of the course must be considered at this phase of the planning. The Organizing Committee should keep an eye on interfering holidays and other seasonal pressures or time conflicts.

The location of the course should offer attractions to participants, for example, proximity to a facility they otherwise would not be able to see. If the participant has to pay for travel and living expenses while attending the course, this feature may be the deciding factor to him and/or his employer.

Physical comfort is a necessary part of an acceptable learning environment. If the chairs are uncomfortable, or the rooms poorly ventilated, ease in observing and participating will be curtailed.

Where translation and interpretation services are being provided, this staff must be briefed and prepared for the special terminology which may be used. Pre-course handouts would be useful for this purpose. Barring the use of professional translation services, a member of the group at each session could brief other participants if a language barrier is known to exist between instructor and participants.

Preparation for physical arrangements should begin early in the planning process. The person or committee in charge of facilities must, of course, work closely with the committee as plans are developed for the course.

If the course is to be given in the same community where participants reside, the facilities committee can easily make the necessary physical preparations. But if the meeting is being held in an out-of-town location, planners should personally inspect the facilities offered and arrange for the type of accommodations desired. Whether in a hotel, a public building, or on a university campus, planners should provide basic facts to the management, local committee, or person assigned the responsibility of arranging for the necessary physical facilities.

Provide your host with facts. Tell him what you need and what you can afford. Answer all his questions. To save time, before visiting the site to work out details, write down the basic requirements and send them to the person assigned to work with you on the facilities. Then go over these instructions with him when you arrive for a planning visit.

If overnight accommodations are required, give the date the majority of the participants will be arriving and departing. Estimate the approximate number of rooms required. Establish an understanding about whether reservations are to be confirmed directly to the participants or cleared through a local housing chairman. Get the daily room rates for single, double, and twin reservations (are flat rates available for participants?), and obtain a guarantee that rooms will be provided to participants at the rates confirmed to them. Provide information regarding the number of rooms which need to be set aside for program participants and special guests.

Spell out the requirements for meeting rooms. Indicate the seating capacity of each room required for each session,

for exhibits, meal functions, and receptions or "coffee breaks". Indicate what special equipment or facilities will be required. If possible, get floor plans of the rooms suggested for your course, complete with dimensions and location (on which floor? in what building?). Determine if there are any acoustical or air-conditioning problems which must be solved.

Plan how each room is to be used. Determine the setup desired for tables, chairs, and platform. Itemize the specific requirements (public address facilities? lectern with reading light? chalkboard? easel? ash trays? water pitcher and glasses? projector?).

For any planned meal functions estimate the number of people to be served, any special menus, and determine the cost per person and who pays. Find out when you must make your final guarantee and when payment must be made for the function.

The registration committee should work out the details of the welcoming and registration process and do a thorough job of briefing the personnel who will staff the registration desks. Here are some basic suggestions:

* Set up a simple registration procedure. Don't give one person too many functions to perform. Three-member registration teams seem to function best. One person receives the completed registration card from the participant, checks it for accuracy, and hands it to the second person so that a badge can be prepared. While the badge is being typed or printed (preprinted badges are best, of course), the first person collects the fee from the participant and issues a receipt. The second person places the participant's registration card in an alphabetical file and hands the completed badge to the participant. The third person in the registration process hands to the participant all course materials (kit, list of participants, program of activities, etc.)

* Prepare in advance all kits for participants.

* Have an information desk at the registration area.

* Have large, clear signs and simple instructions conveniently posted.

If you plan exhibits, a separate committee should be established to coordinate them and to establish the necessary policies. The committee will have to recruit exhibitors, arrange for space and develop the exhibit layout plan, determine the hours the exhibits will be open. Adequate space must be provided at the site and the details worked out with the building management.

GUIDELINE 12: Pre-course materials, if any, must be prepared early and distributed to participants.

As mentioned earlier, both the training staff and the administrative staff are responsible for the design and production of learning materials. If there is a chance that special problems may arise because of the differences in cultural orientations between the instructors and participants, every effort must be made on the part of the Organizing Committee to overcome these difficulties. If a language barrier is known to exist, it will be extremely valuable to have an outline and some basic readings in the language of the participants. If the topic is extremely technical, pictorials, charts and other materials, in the hands of the participants well in advance, should assure maximum learning during the short term of the course. Basic readings can be done ahead of time if the bibliography is sent to participants.

Pre-tests which can be used as diagnostic aids to the teaching staff may also be sent to the participants, with a clear statement that their responses will not be used on an individual basis but collected to aid the instructor in the presentation of his material. An instructor's presuppositions about the knowledge level of the participants must be tested or his level of presentation may not be appropriate.

The following checklist is a continuation of the checklist presented at the end of Section I.

SECTION II. Checklist for Organizing Course

13. ☐ Have you established a schedule for administrative tasks to be performed?

14. ☐ Have you sent out preliminary course announcement? final course brochure?

15. ☐ Have you reached agreement with training staff on course outline, learning activities, facilities and arrangements?

16. ☐ Have you screened applications and sent acceptance letters with follow-up instructions?

17. ☐ Have you distributed pre-course material (if any) to registrants?

18. ☐ Have you confirmed facilities and equipment availability for course? and living accommodations (if any)?

19. ☐ Have you arranged for transportation? special dietary menus? living quarters?

20. ☐ Have you arranged for registration/hospitality on first day of course?

21. ☐ Have you sent out press release?

SECTION III. IMPLEMENTING THE COURSE

Implementation of the course does not mean that all planning is concluded. Although the bulk of planning may be done before implementation begins, each of the phases overlaps the other.

GUIDELINE 13: Scheduled rooms for course must be checked out for satisfactory size, ventilation, electrical outlets, furniture, seating arrangements.

Although all of these arrangements may have been made some time before the actual time of the course, it is not an extraneous detail to make a last minute check. The weather conditions, size of the group, last minute changes in schedule of activities and use of equipment will need to be accommodated.

GUIDELINE 14: Final time schedule for course activities must be determined and distributed to all participants.

The daily schedule, with assignments for staff and participants should be part of the materials prepared for the course. This is a critical task as the time schedule, reviewed with the course objectives in mind, will determine if the objectives can be met. Perhaps daily discussion guides or instructional materials could be distributed from a central place (e.g., a meal function which all attend). Such a hand-out could serve as the organizational guide for all the course materials which a participant would keep in a loose-leaf binder. (See example in Appendix C of these guidelines.)

Related materials could include information about the center where the course is being held, the living arrangements,

handling of mail, telephone calls, absences, recreational resources, map of the area, and library facilities, if any.

The time table presented to the teaching staff, especially if they are outside resource personnel, would include such additional information as the following:

1) the actual attendance and composition of the group

2) how the course is planned en toto

3) anything that has happened which might affect his presentation such as questions or problems which have already been raised

4) whether questions from the group will follow his talk and how they will be handled

5) who will introduce him

6) a review of the specific timing and content of the program

7) information about any aids which he requested, such as chalkboard, easel, overhead projector, etc.

GUIDELINE 15. Educational activities must be stimulating for intended audience and promote discussion and exchange of view.

Participants usually are not ready to plunge into discussion early in the course. The participants will have been selected with education or background experiences fitting for maximum usefulness of course, but even so, some time for orientation is needed.

Before the typical participant starts to take part in the question-and-answer discussion, he needs to become involved and identified with the group so that he will feel at ease. If there are language differences in the group, some arrangements for interpretation and discussion will have to be made.

Participants will have some questions which should be answered in the course materials handed out early in the course or be given answers by the instructor:

1. Who is who? Who are the other participants? How do the participants compare in terms of background, on-the-job skills, and experience?

2. Where do I fit in? What's expected of me? How am I supposed to participate? How much am I expected to contribute? Do I just sit and listen or am I expected to talk?

3. What's the purpose of this course? What are the goals and objectives? Who designed the course? What are we expected to accomplish?

4. What is the content of this meeting? Although a printed program is provided, what explanation is there for the subject matter to be discussed? What are the ground rules? Will reports be published?

If these questions are answered, even through a quick orientation period at the opening session, the participant may participate more readily when the opportunity arises.

There are three basic problems which account for the failure of most question-and-answer periods:

1. Th problem of communication.

2. The problem of putting information to work.

3. The problem of collecting information to use in planning future meetings.

There are four major obstacles to the first concern, communication, which must be overcome:

1. The listener's logic may not be the teacher's logic. What makes sense to one person may not make sense to another.

2. The teacher may be talking over the heads of his listeners or talking "down" to them.

3. No one remembers everything. We attend to that which we wish to attend to, and interpret what we see and hear in terms of our own interests and experiences.

4. All those in the audience will not absorb information at the same rate. Some listeners will be frustrated if they get too much too fast, or become bored if they get too little too slowly.

A second reason why question-and-answer periods fail is the problem of using information. It's quite an accomplishment to have information understood, but there are even more obstacles to be hurdled before information will be used.

There is also a big difference between listening and thinking, and formulating a question or comment. The question-and-answer period can put new information to work, however, and can make thinkers out of listeners, if shyness is overcome, and a trusting atmosphere has been created by the teacher.

There are eight things the question-and-answer period can do to help get information used:

1. Check whether the information was understood and remembered.
2. Correct misunderstandings and misconceptions.
3. Uncover gaps in knowledge that need filling in.
4. Discover some of the resistances of members of the audience.
5. Test the extent to which listeners have related the information to their needs.
6. Give participants a chance to discuss, and thus begin to use, the new information.
7. Provide an opportunity to reemphasize main points, and to summarize again.
8. Indicate the kind of further help, if any, the audience will need to use the information.

The third problem: Question-and-answer periods are overlooked by course planners in gathering information for future meetings.

Analysis of the question asked and reactions of the audience is a valuable guide to planners, both in evaluation of the present course and in planning another meeting. Several questions raised about a single topic might suggest a topic of interest for a future meeting. Questions also indicate the feelings of the audience. They reveal the background and understanding the audience has on a particular subject, as well as areas of special interest, hostility, prejudice, apathy, and ignorance.

Most question-and-answer periods achieve only a small fraction of what was sought by the planners and what could be accomplished. The full potential of an audience involvement technique could be reached if these factors are considered:

The question-and-answer period should be a fundamental part of the entire course, not just an afterthought.

It should be tied in with each session, not just tacked on at the end.

It should help tie up loose ends, summarize, and clarify any issues that still remain.

It should help the members of the group see how to use what they have just learned.

It should reveal to course planners just how much of the program really got across, reveal the interests and reactions of the group, and provide clues to planning future meetings.

How to plan effective question periods?

There are three basic steps in this vital part of the course planning process:

STEP ONE: Get the group ready to ask questions. Prepare them for this step at the beginning of the course. Assure them that everyone in the group asks questions. Make them feel comfortable about raising questions and make it easy for them. You can do this if you (1) provide sample questions before the speaker begins, questions which may stimulate other questions; (2) brief the group on the purpose of the course and what to listen for at this point of the program; (3) provide a suggestive outline of some of the most important points to be covered by the teacher (these can be mimeographed or written on a chalkboard; (4) divide the group into listening teams before the talk; those on the right side of the room form one team, those in the center another team, and those on the left a third team and each team listens for a particular point in the speech; and (5) try to bring out certain areas in which the group is interested, the problems and issues listeners feel are important, and the questions they want answered.

STEP TWO: Get the questions down in writing. When listeners take notes they become involved, so do everything possible to encourage note taking. Provide notebooks or cards (and pencils). Ask teachers using visual materials to allow listeners time to jot down illustrated points. Questions jotted down on cards can be collected and quickly sorted so they can be systematically answered and anonymously asked.

STEP THREE: Help the audience get the most important questions. Too often the question-and-answer period produces irrelevant or unimportant questions that are not representative of the interests and concerns of the total group. Planners can help avoid this problem by utilizing different techniques:

Divide the audience into groups of 6 to 10 persons for a limited time of about 10 minutes. Ask them to form small circles with their chairs, or ask people in part of one row to turn around and talk with those directly behind them. Ask each group to select someone to serve as a recorder to report their conclusions or major questions to the audience and the speaker.

Interview panels from the group can be asked questions of the speaker or panel of experts. These panel members are chosen before the speech to represent the various back-home interests of the audience, such as people from small, medium, and large-size libraries. Their questions represent the point of view of their own counterparts in the group and may help to spur the question-and-answer period.

Reaction panels can also be utilized (with permission of the teacher) throughout the session, rather than only at the end of the presentation. A similarly representative group from the group is asked to present questions at any time during the presentation. Here again, the questions

should be those of the group which they represent, not their own personal questions. As an alternative, these reactions can be obtained at the end of the speech, listed on the chalkboard to indicate the range of questions from the group, and then the teacher responds. This technique allows the chairman to categorize questions for ease in obtaining answers from the teacher.

A general session might include an audience-speaker panel, composed of the speaker and a few members of the audience. This adds to the sense of group participation and may result in a more thorough treatment of major questions.

Course planners can learn from the question period, too. They can observe the extent of communication from the platform to the group; whether members of the group were making an effort to apply what they heard; the attitude of the group toward the teacher; and whether the session served the needs and interests of the group. Through careful analysis, planners can improve future meetings by learning how to achieve greater involvement and participation from the participants.

For some courses, it may be necessary to require groups to read materials or work problems before the next session. If this is the case, adequate supplies of materials and study facilities should be provided.

GUIDELINE 16: Materials prepared and distributed must be appropriate to illustrate concepts and principles which apply in actual situations.

Following this guideline in a developing country may require the adaptation of existing materials readily available. Since most of these materials will have been designed with a more developed society in mind, it might be well to use them for reference but to develop new materials

especially for the course as you can then incorporate unique features for the intended audience. Inappropriate materials can jeopardize the educational outcomes anticipated from the course. Materials should be clear and understandable to the learner, directly relating to his needs and to the nature of the service he renders. Examples used must have some pertinence, relating to both subject matter and geographic interest areas of the participants.

GUIDELINE 17: Sequence and pace of instruction should match the variety of capabilities of the participants.

The discussion on "Critical Tasks" #2 and #6 in the Introduction itemized some different ways to conduct courses and use materials dependent on the participants and the topic to be covered. It would be helpful to review those suggestions at this time. Also, Guideline 6 in Section 1 is especially appropriate to review again, for therein can be found a list of the type of groupings of participants and when they might best be used.

Most often the sequence should proceed from simple to complex, with general remarks made for orientation, but for a gradual building to generalizations after a number of specific aspects have been covered.

GUIDELINE 18: Learning aids (audiovisual and others as needed) must be in good working order and available when needed.

Anyone who has been in the audience when the lights were turned out and the projector turned on, with no result,

will appreciate the need to check out all equipment prior to the time of use. Anyone who has set in a long narrow room, in the dark, and watched a sequence of slides being projected without once being able to read the captions because they were too small, will appreciate the need to check out the materials prepared for use with equipment. Care and caution beforehand in the production of the materials for the particular audience and the dimensions of the meeting room will insure successful utilization of learning aids.

The following checklist is a continuation of the Checklists which appeared at the end of Sections I and II.

SECTION III. Checklist for Implementing the Course

22. ☐ Have you checked the rooms for the course to determine satisfactory ventilation, size, furniture, seating arrangements, etc.?

23. ☐ Is the required equipment at the meeting site and in good working order?

24. ☐ Have you assigned specific persons to the various supportive tasks?

25. ☐ Have the arrangements for meals, refreshment breaks been confirmed?

26. ☐ Have the instructors been briefed? Are there any changes in time schedule of activities?

27. ☐ Will the pace of instruction and sequence of learning activities be monitored for effectiveness?

28. ☐ Are the handout materials pre-assembled and available on time and in sufficient quantities?

29. ☐ Have welcoming and departure arrangements been made final?

SECTION IV.* EVALUATING THE COURSE AND OTHER POST-COURSE ACTIVITIES

Evaluative methods can provide information about the extent to which a course's impact is what was intended and to discover the means by which that impact was achieved. Two kinds of evaluation are possible. Both may be necessary. The first is course evaluation which is used to provide feedback about the course in process so that it might be adjusted as necessary. The second is results or outcome evaluation, which is used to measure the degree to which objectives have been met. Each of these kinds of evaluation must be planned from the beginning of the course in order to determine what information will be needed, how to acquire that information, and how to use it.

GUIDELINE 19: The purposes for evaluation must be determined.

Why the course is to be evaluated should determine the nature of the evaluative process to be used. Only after this question has been answered can consideration be given to how to do it. One of the main reasons for evaluation should be to determine to what extent, and perhaps in what ways, the course met its objectives. Organizational reasons for evaluation are usually predominant (e.g., use of the evaluation findings to justify a change is the process of personnel appraisal and promotion, or to modify the current assignment of responsibilities within a library or information center). Nevertheless, provisions for meeting individual interest for

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* For more details the reader may consult the "UNISIST Guidelines for the Evaluation of Training Courses, Workshops and Seminars in Scientific and Technical Information and Documentation", Paris, Unesco, 1975.

self-evaluation should be considered also. The individual learner should be able to freely choose whether or not to evaluate himself, and to determine the disposition of that evaluation.

The Organizing Committee and/or the sponsor and/or the training staff would be excellent sources to determine the purposes of the evaluation.

GUIDELINE 20: The evaluation process (during and after the course) must be planned.

To plan for evaluation, the following questions will have to be answered:

What do we need to know? Who has that information?

How do we obtain that information? (What procedure is necessary and possible?)

How do we want to use that information? (Who needs it to act upon?)

The answers to these questions begin to form the plan.

Someone other than the coordinator or chairman of the Organizing Committee should be assigned the responsibility for formal evaluation. This person is probably "too close to the forest to see the trees" and his evaluation may, quite naturally reflect bias and the high hopes of the committee. Then, too, most participants sometimes have a tendency to tell the coordinator or instructor what they think they would like to hear, not how they really felt about the course. An outside observer, perhaps appointed by the

Organizing Committee or sponsor, could collect the most reliable information.

GUIDELINE 21: Reliable and valid evaluation information must be collected, organized and analyzed.

Evaluative information needs to be collected at the time it is generated and available. For example, a short-term, subjective evaluation from the participant could be gathered by means of a post-course reaction sheet during or at the end of an activity. If pre- and post-skills tests or attitude assessments of individuals in the course are needed, those tests need to be administered and the data collected before and after the event being so evaluated. Each evaluative technique used should be selected if it has the acceptance by those being measured and those seeking the information being collected. Varying techniques might be used to discover different kinds of information, e.g., evidence of reaction to the course, learnings from the course, changed behavior. Different techniques might include: interviews, tests (standardized, custom-made, or performance), products produced during or after the course, job performance records, trainer evaluation. Information from various sources and means can be used to cross-check results.

The person in charge of the evaluation process would have to perform the following tasks:

1. Design the fact-finding and evaluation devices.
2. Train interviewers and observers, if required.

3. Serve as liaison with work group observers, if these are used.
4. Tabulate and interpret the evaluation data.
5. Recommend to the Organizing Committee, the sponsor, and future course planning committees how to make improvements in the organization and pattern of such courses.

Answers to basic questions are needed to measure the effectiveness of the course and guide their efforts in future planning. Participants should be asked:

* What did you hope to get out of the course?
* Were your expectations fulfilled? Completely? Partially?
* How useful was the course?
* How well were your problems dealt with?
* What could be done to improve this course?
* What is your opinion on the methods of presentation used?
* What suggestions do you have for the subject matter of a future, similar course?
* What use, if any, do you plan to make of the material from this course?

These, and similar questions, can be asked directly or indirectly during the course. There is no need to wait until the closing session, when there are other things to do and participants are mentally packed to leave.

Sample interviews can be obtained frequently. Some planners assign interview teams the responsibility of asking questions of a handful of participants at lunch each day. These questions can be aimed at the evaluation of the mechanics of the course (adequacy of communications, physical arrangements, satisfaction with teacher, living arrangements, etc.) Feedback of this information is helpful to the committee, as well as future planning committees.

Written questionnaires can be used for evaluation if there are no cultural barriers to their use. These should be printed in advance and distributed to participants with their materials or handed out at the appropriate time during the course.

Multiple choice answers are often provided. For example:

"How do you rate what you heard from the teacher at the first session?"

_____ Extremely valuable
_____ Moderately valuable
_____ Of little value
_____ Of no value
_____ Did not attend

"Considering the program of the day as a whole, what part was helpful to you? Check as many of the following as you choose."

_____ Opening session
_____ Small group discussions
(Which group? _____)
_____ Closing session
_____ Exhibits and materials

Open-end or essay questions should be included in the written questionnaire to allow for free expression of opinion, such as:

"What, if anything, do you think could be done to better the course?"

"What part of the program was the least significant? Why?"

"What suggestions do you have which you believe might be useful in the planning of future seminars?"

Keep your written questionnaire short and simple. If it is too long and too complicated, participants may not return it, or may respond to only part of the questions. A

one-page, 8 1/2 x 11 inch sheet of paper is enough for most questionnaires. (See Appendix D for an example.)

Do not ask participants to sign the questionnaire. Simply indicate that signatures are not necessary.

GUIDELINE 22: Evaluative data must be reported and utilized.

Course evaluation results can benefit the information community if they are recycled into revisions which modify and improve future courses. The information which has been collected and organized should be reported in such a way as to be understandable to those who need to use it. The information pertaining to the course itself should be recycled into the course where it may prompt modification. The information pertaining to the outcomes that have resulted from the course should be the basis for developing the appropriate next steps by an agency responsible for manpower development.

Appropriate means for review and feedback from participants in the course and others involved in it should also be provided.

A participant has to travel both geographically and socially when he attends a course, seminar or workshop. This applies, to some extent, whether he journeys to another country for a seminar or only as far as the next city for an in-service training workshop.

Every course is a miniature society which is set up to assimilate persons from various on-the-job cultures.

Kenneth D. Benne, of Boston University, and the late Charlotte K. Demorest have described three typical ways participants can handle dual membership of course and home community. They suggest the participant can react as:

> A tourist. Resisting involvement in the course, he rejects it as being "impractical" and theoretical; feels the methods and techniques used at the course are unlike the way things operate at home.
>
> An expatriate. Far from rejecting the course experience, the expatriate accepts it enthusiastically and uncritically. What he rejects, at least for the time, are his home situation and membership.
>
> A learner. He accepts membership in the course community and opens himself to influence from others who are there. But he tests course ideas against home problems and situations, relates relevant on-the-job experiences to problems discussed at the conference.

How the participant reacts to the course will have a lot to do with what he does, if anything, with his experiences when he goes home. He is faced with two problems when he leaves the course: immediate reporting to superiors, colleagues, or subordinates; and long-range changes in attitudes, policies or procedures.

Participants may appreciate some help, before the meeting ends, on reporting their experiences at the course. This may form the most valuable of evaluative reports. Participants could be asked to act out their projected first step upon arriving back on the job, whether this step is reporting to the boss, discussing the course at a staff meeting, or trying out some new technique on the job. Other participants can then discuss what has been acted out and can

clarify and face the problems they will encounter when they return to their home communities.

Other methods of assisting participants in reporting are:

* Throughout the course, encourage participants to discuss how they will report their findings to colleagues at home.

* Give participants a directory of available resource people, so that each participant will be able to schedule a consultation period within the limits of time and availability. Here each individual can discuss, with the resource person, possible ways of utilizing course ideas back home, and can organize the reporting of those ideas.

* Provide each participant with a suggested checklist to help in the organization of the written report to his superiors.

* Provide a "take-home packet" of materials which summarize the major activities and ideas formulated at the course, including any samples of materials distributed.

* Encourage participants to take notes. Provide notebooks in which each participant can keep a condensed outline of the subjects discussed at the conference.

* Leave some time in the schedule so that teams of participants can meet from time to time. Give them a chance to compare notes and to relate their experiences to back-home problems.

GUIDELINE 23: Summary reports must be distributed to participants and other interested parties.

As courses in developing countries are implemented and evaluated, it might be well to consider preserving the summary record of activities as guidance for future meetings. Every participant is a potential teacher for the next course. Sponsors may wish to continue sponsorship of similar courses

in another region or country. A valuable part of the record for this course will be lost if summaries are not produced. Recorders can be assigned during the meeting. Their raw reports could be culled and used to produce the summary reports.

A separate financial report should be made to the sponsor and responsible parent organization. (See Appendix for budget items which should be reported on.)

GUIDELINE 24: Directories, bibliographies and other guides could be compiled.

If the course is such that useful products are produced, such as bibliographies, directories or guides, these should be assembled and a complete packet made available to every participant, the instructor, Organizing Committee members and the sponsor.

GUIDELINE 25: Follow-up reports could be received from participants at fixed intervals after the course.

Remembering the value of a course in creating a "miniature society" it might be well to insure an extended life for the group of participants in case there is anything to be gained for them and the information community from such an alliance. The impact of the course can also be tested for its long-term effects. This will guide designers of similar courses in the future.

GUIDELINE 26: Final contact with training staff should be a cordial affair.

Have payment ready for the instructors if possible, but be discreet when presenting it. If they are paying expenses, at first, assure them you will reimburse them immediately upon receiving a note listing expenses. If necessary forms for reimbursement of travel expenses are required, give them before departure.

Immediately after the course, write a note of appreciation to the instructors telling how much you appreciated their effort and include any favorable comments received from participants. Send clippings or follow-up reports from the meeting. And take time to carefully evaluate the job the instructor has done. This will help in the selection of future teachers for similar courses.

The following list of questions completes the Checklist of questions begun in Section I and continued in II and III.

SECTION IV. Checklist for Post-Course Activities

30. ☐ Have you decided on the proper form for evaluation of the course? of the instructor? of the participants?

31. ☐ Have you collected and analyzed evaluative data?

32. ☐ Have you written and used the evaluative report?

33. ☐ Have you prepared post-course reports to sponsor? to participants? Have participants produced reports?

34. ☐ Have you distributed post-course materials?

35. ☐ Have you sent a letter of appreciation to instructors?

APPENDIXES

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INFORMATION SCIENCE CLINICS

SYRACUSE UNIVERSITY
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SCH OF LIB SCIENCE
SYRACUSE NY 13210

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Dr. Martha Boaz, Dean
School of Library Science
University of Southern California
Los Angeles, California 90007

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INFORMATION SCIENCE CLINICS

4 SHORT ONE-DAY PROGRAMS FOR LIBRARIANS

SPRING 1974

PRESENTED BY

THE SCHOOL OF LIBRARY SCIENCE
UNIVERSITY OF
SOUTHERN CALIFORNIA
LOS ANGELES, CALIFORNIA 90007

DATES: FEBRUARY 22, MARCH 15, MARCH 30, APRIL 19

INFORMATION SCIENCE CLINICS

For Academic, Public, Special, and School Librarians

Spring 1974

Objective:

to provide working librarians with current state-of-the-art exposure to various topics in the field of information science.

Clinic Format:

small group sessions lead by an experienced practitioner. These small group sessions will be oriented towards type of library, either academic, public, special, or school.

Topics and dates:

Clinic for Public Librarians	Friday, February 22
Clinic for Academic Librarians	Friday, March 15
Clinic for School Librarians	Saturday, March 30
Clinic for Special Librarians	Friday, April 19

Time:

Clinic scheduled for 9:00-4:00 with the following format:

9:00-9:30	registration and coffee
9:30-10:00	introduction and overview
10:00-12:00	clinics 1 & 2
12:00-1:15	luncheon
1:15-3:15	clinic 3 & 4
3:15-3:45	summary

Clinic Topics:

1 **Basics of Micrographics**
origins of the field; relationship to libraries; types of microforms; production methods; storage, retrieval, and projection equipment; problems and trends

59.

Appendix A-1

63

Basics of On-line Systems
basic terminology and concepts; hardware and software considerations; representative on-line library processing systems; representative on-line bibliographic retrieval systems; dial access.

Quantitative Methods
basic systems and cost analysis techniques; evaluative methodologies; statistical measures; accountability.

Management Considerations
planning, staffing, and budgeting considerations; staff and patron orientation; relations with computer centers; networking consideration; case studies.

Special Considerations:

Participants will choose two of the above clinics, one during the morning session and one during the afternoon; the summary session in the late afternoon will include summaries from each of the clinic leaders; appropriate 'hands-on' experience will be provided when appropriate.

COORDINATOR OF THE CLINICS:

EDWARD KAZLAUSKAS, Assistant Professor, School of Library Science, University of Southern California.

THE STAFF:

HERBERT AHN, Head, Library Systems Analysis Office, University of California, Irvine
VIVIAN ARTERBERY, Supervisor of Circulation Controls and Records Retention, Charles C. Lauritsen Library, Aerospace Corporation
STANLEY A. ELMAN, Doctoral Fellow, Library School, University of California, Berkeley
MARY FISCHER, Coordinator of Automated Library Technical Services, Los Angeles Public Library
DAN M. GIBSON, Director of Instructional Materials, Beverly Hills Unified School District
EDWARD HESS, Assistant Professor, School of Library Science, University of Southern California
JOHN KOUNTZ, Associate for Library Automation, Chancellor's Office, Library Systems Project, California State University and Colleges
JILL LE CROISSETTE, Assistant University Librarian (Technical Services) California State University at Los Angeles
EDYTHE MOORE, Manager, Charles C. Lauritsen Library, Aerospace Corpoation
GERALD NEWTON, Chief of Library Technical Services, California State Library
HARRY ROWE, Head Librarian, Orange County Public Library
FRANCIS SPREITZER, Head, Micrographics and Reprography Department Doheny Library, University of Southern California

WORKSHOP COMMITTEE:

Vivian Arterbery
Nancy Jouett
Norman Tanis
Harry Rowe
Martha Boz, Chairman

TO ENROLL:

Early enrollment will assure you of a place in the program. Registration should be received two weeks before each clinic begins. Later enrollment will be accepted if space permits. Enrollment in each clinic will be limited to 40 people.

FEES:

$45 for each clinic.

REFUNDS:

Refunds will be made if requests are received in writing no later than three days before the program begins.

LOCATION:

School of Library Science Building, University of Southern California

FOR FURTHER INFORMATION:

Call or write to: Dr. Martha Boaz, Dean, School of Library Science, University of Southern California, Los Angeles, California 90007 (213) 746-2548.

ENROLLMENT FORM

Please indicate the workshop in which you wish to enroll:
(name of clinic) (date)
clinic for
clinic for
clinic for
clinic for

Please indicate your preference of the clinic topics, by ranking from 1 to 4 (with No. 1 being first clinic)
1. Micrographics
2. On-line Systems
3. Quantitative Methods
4. Management Consideration

Each workshop is $45.
Make check payable to: School of Library Science, University of Southern California

Authorizing signature
Mr.
Miss
Mrs. First Middle Last name
Home address: Street
City State Zip
Social Security number:
Daytime phone: area
Evening phone: area
Position or title:
Firm or Library:

Appendix A-2

The fellowship will cover a return ticket from the place of origin to Warsaw, transportation to and from Katowice board and lodging and a small monetary allowance. In addition, all participants will receive a textbook and relevant teaching material prepared for the course. In addition to the twelve participants benefiting from fellowships, eight participants will be accepted into the course at their own expense.

Accommodation possibilities for participants attending the course at their own expense *

Daily tariffs for second class hotels in Katowice

single room without bath	$8
twin room without bath	$13

(a) Daily tariffs for first class hotels in Katowice (meals included)

single room with bath	$23.50
twin room with bath	$38
single room without bath	$18.50
twin room without bath	$33

(b) Daily tariff at the Hotel Europejski, Warsaw (meals included)

single room with bath	$28
twin room with bath	$46

Methods of application

All applications concerning the course should be addressed to

Mr. Jan Sygitowicz
Director-General
CINTE
WARSAW 68
Al. Niepodleglosci 188
Poland

with copy to J. Tocatlian, Unesco, Division of Scientific and Technological Documentation and Information 7 Place de Fontenoy, 75700 Paris, France.

Applicants should indicate whether they should like to apply for one of the twelve fellowships granted for this course or whether they will cover the cost of the course themselves, and seek admission to one of the eight remaining places.

Criteria for selection

Applicants should send a detailed curriculum vitae clearly indicating their background, language proficiency, present position and salary, future responsibility in their country, amount of training they have done in teaching or will be expected to do in the future.

Selection

Screening of candidates will take place in Warsaw around 15 April 1974. Successful candidates will be advised as soon as possible after this date.

Closing date

The closing date for receipt of applications is 1 April, 1974.

★ tentative tariffs

UNISIST

International training course *in* Information retrieval *and* Information retrieval systems

61.

4 — 24 August 1974
Katowice
Poland

Organized by the United Nations Educational, Scientific and Cultural Organization (Unesco)

in collaboration with the Ministry of Science, Technology and Higher Education of Poland

The Centre of Technological Development

The international course will be held at the Centre of Technological Development, Katowice, Poland, from 4 to 24 August, 1974.

Course on Information retrieval and Information retrieval systems

The course will deal with the fundamental principles of information storage and retrieval systems. Major emphasis will be placed on the factors that importantly affect the performance of all information retrieval systems, whether they are simple manual files or more complex mechanized systems. These factors are largely intellectual, relating to how materials are indexed, how searching strategies are constructed, the vocabulary used for indexing and for searching, and methods of interaction between the system and its users. Accordingly, the course will deal with principles of indexing, vocabulary control, and searching strategies for modern information retrieval systems. Criteria by which the performance of retrieval systems may be judged, along with elements of evaluation methodology, will also be dealt with.

A wide range of possible systems, from the simplest manual files to the most sophisticated computer-based, on-line, interactive services, will be covered.

In addition to systems for searching bibliographic records for previously published literature (i.e., systems for *retrospective searching*), the course will discuss procedures by which a scientist, or worker in some other field, keeps himself up to date with new developments in his area of specialization. Publications and other services that are designed to serve this *current awareness* function will be described and discussed in the course.

Appendix A-1

Sponsorship of the course

The international course is organized by Unesco in collaboration with the Ministry of Science, Technology and Higher Education and the National Centre of Scientific, Technical and Economic Information, of the Polish People's Republic.

Aims of the course

The course is intended mainly to serve the needs of developing countries. It will be an introductory course on the principles of information retrieval and information retrieval systems. Its special purpose is to train educators, i.e., those engaged in the education and training of information workers, in developing countries. The course will be designed to give participants enough information and guidance to allow them to organize a similar course or workshop in their own countries.

Course organization

The course will be conducted by means of lectures, slides, handouts and films. There will be plenty of opportunity for participants discussion. Some use will also be made of projects and exercises that participants will work on individually and in groups. A bibliography of pertinent articles, to aid the student in further study, will be provided.

Staffing of the course

The course will be conducted by a team of two lecturers, both with considerable experience in the design, operation and evaluation of information retrieval systems.

The principal lecturer will be F.W. Lancaster, Professor of Library Science at the University of Illinois, Urbana, Illinois, U.S.A. Professor Lancaster has had wide experience, covering a period of over ten years, in the field of information storage and retrieval. He is the author of three books *(Information Retrieval Systems: Characteristics, Testing* and *Evaluation; Vocabulary Control for Information Retrieval;* and *Information Retrieval On-Line)* as well as numerous technical reports and journal articles.

The Assistant Lecturer will be Mrs. Nicole Warnet (France) of I.M.A. (Information Médicale Automatisée) de l'INSERM. Mrs. Warnet organized and set up the MEDLARS system in France and is now organizing and setting up the MEDLINE network of information also in France.

She is the author of numerous publications, technical reports and articles.

Qualifications of candidates

Preference will be given to participants who are engaged in the education and training of information workers or who are likely to have responsibilities of this nature in the future. The object is to ensure that the course has maximum possible impact through further dissemination of the subject-matter covered within the countries of the participants.

The course will be conducted entirely in English. Proficiency in spoken and written English is therefore an essential qualification for all participants. Evidence of this should accompany the application.

Financial assistance and fellowships

Overseas candidates nominated by governments of Unesco Member States may be eligible for a fellowship. Twelve fellowships will be granted to participants from developing countries who fulfil the required qualifications, maintaining as far as possible an equitable, geographical distribution.

ADVANCED INFORMATION WORK

A UNISIST / UID / IFLA International Summer School for Teachers and Workers in the Information Field.

6th July - 1st August, 1975
Sheffield and London, United Kingdom

presented by the

UNIVERSITY OF SHEFFIELD
POSTGRADUATE SCHOOL OF LIBRARIANSHIP AND INFORMATION SCIENCE

In collaboration with the United Nations Educational, Scientific and Cultural Organization (Unesco), the International Federation for Documentation (FID) and the International Federation of Library Associations (IFLA)

SC-74/WS/17

Photographic reproduction of the original manuscript

Introduction

A main objective of the International Federation for Documentation (FID) and the International Federation of Library Associations (IFLA) is to promote the training of information specialists. The development of manpower resources essential to the planning and operation of present and future information services and networks is also one of the priority objectives of Unesco's UNISIST programme. In the UNISIST programme an effort is made to strengthen the capabilities of information workers involved in the information transfer process, and to develop their skills through educational programmes. Within these activities priority is given to assistance to the developing countries where the demand for specialized skills is particularly high.

The UNISIST/FID/IFLA Summer School, to the preparation of which Unesco has given a substantial support, represents a co-operative effort towards this goal. The Summer School in 1975 is to be presented by the University of Sheffield Postgraduate School of Librarianship and Information Science. It will be of four weeks' duration - 6th July to 1st August 1975 - the first three weeks being in Sheffield and the fourth week in London.

Objectives

The Summer School aims to introduce experienced and qualified participants to new developments and advanced modern practice in information and library sciences. It is intended primarily for teachers and potential teachers of library and information studies, particularly those from developing countries. It will be conducted in English and particular emphasis will be placed on educational implications.

Content

The Summer School will cover the following three areas of study :

(a) Computers and library/information work,

(b) Information retrieval, and

(c) A systems approach to management.

Each of them represents a field of central importance in which significant developments are taking place, and in which the Sheffield School is active in advanced study and research.

There will be an introductory overview, and a "state-of-the-art" review of each area, to be followed by an intensive course of studies on the lines set out below. Detailed programmes of studies, based on the three principal areas, will be designed to take account of the needs and backgrounds of those selected for participation in the Summer School.

SCOPE OF AREAS OF STUDY

(a) Computers and library/information work

The studies in this area will provide a state-of-the-art review of applications of computing and telecommunications technologies in bibliographical information handling, to enable an assessment of the basis for effective computer-based information systems to be made. Following a general introduction on the role of the computer in information handling, the course will deal with the representation and manipulation of bibliographic information and data in computer storage, with file structure and processing, and with the automation of data-base compilation and publication. This will be followed by study of the implementation and use of bibliographic information and data systems, reflecting their applications both in libraries and information services and centres. The role of international and national organizations in their development will then be considered.

(b) Information retrieval

The studies will concentrate upon research activities, findings and developments in certain selected areas of information retrieval. Following a general orientation session, discussion and analysis will centre upon specific retrieval 'problems', viz. indexing and national bibliographies ; cataloguing code developments after AACR ; the development and application of MARC in various types of library ; classification, its present state, with a speculative look at the future ; thesaural developments ; information retrieval research, a study of methodology and findings. In addition, individual projects may be undertaken by participants wishing to concentrate upon particular aspects of the course (e.g. construction of a thesaurus, detailed examination of a special research project, etc.).

(c) A systems approach to management

Studies in this area are aimed at broadening and deepening the participant's view of management by considering libraries, information centres, national documentation centres, agricultural extension services, industrial liaison services, etc., as particular examples of systems in general and of "information" systems in particular. Studies will include system operation management, consideration of system performance, and systems analysis and design principles, and particular stress will be laid on environmental factors such as economic, educational, socio-cultural, legal-political, and technological ones. The studies will include a critical assessment of modern management techniques and results of library management research studies.

Methods

An important benefit of the Summer School should be the exposure of the participants to a range of methods of teaching and learning, with consequent opportunity to evaluate their respective merits. During the first three weeks, in Sheffield, there will be lectures, seminars, practical course-work, with emphasis on small-group working and individual participation. Tutorial-type teaching, to deal with an individual's specialized needs and interests will be a feature of the Summer School. Considerable importance is attached to visits of observation as constituting a very effective method of reinforcing and bringing out, in practical situations, the theoretical points discussed in the classroom. A number of such visits, usually of one day's duration, will be interspersed with the teaching during the Sheffield part of the Summer School. The final week, based in London, will be devoted entirely to visits of observation and discussions based on those visits.

Faculty

The Summer School, under the Directorship of Professor W.L. Saunders, will be conducted by five members of the academic staff of the University of Sheffield Postgraduate School of Librarianship and Information Science, namely Dr. G.W. Adamson, Dr. M.F. Lynch, Mr. N. Roberts, Mr. H. Schur, and Mr. T.D. Wilson. Members of this team have considerable experience in academic teaching, in research in the natural sciences, technology, and information science, as consultants in the information field to international organizations and national governments in developing countries, in information systems design, and in information systems operation and management.

Candidates

Participation in the Summer School will be limited to 20-25 teachers and potential teachers of library and information studies, principally from developing countries. Candidates will be expected to have had considerable operational experience, to possess good formal academic qualifications (equivalent to a British honours degree), and professional qualifications at roughly the American Master's degree level. Proficiency in spoken and written English is essential for all participants.

Applications

All applications from prospective participants in the Summer School must be made on the 1975 Sheffield Summer School application form which may be obtained from :

. Mr. J. Tocatlian
Division of Scientific and
Technological Documentation
and Information
UNESCO,
7 Place de Fontenoy,
PARIS 7°,
France

or : The Secretary General
F . I . D .,
7 Hofweg,
The Hague
Netherlands

.../.

The completed application form should be sent to :

. 1975 Sheffield Summer School,
Postgraduate School of Librarianship and Information Science,
University of Sheffield,
SHEFFIELD S10 2TN
England

so as to reach the School before the 15th October 1974.

Selection

The final selection will be made by a Screening Committee. Selection will be on the basis of details supplied by the candidate on the application form, referees' reports, the candidate's potential ability to benefit from advanced training, and his (her) ability to contribute to the development of library and information studies in his (her) country. Applicants will be notified of the result after the 15th December 1974.

Accommodation, costs and financial assistance

In Sheffield, the Summer School will be accommodated in a fine, modern, University Hall of Residence, where lecture and discussion rooms will also be available. For the week in London accommodation will be either in a University of London Hall of Residence or in a Hotel.

The exact fee will be notified to successful applicants in December 1974. The estimated fee is £275, and includes the cost of 20 days in Sheffield, including all meals, morning coffee, afternoon tea, 3 full-day visits of observation ; recreational visits to York, Chatsworth, the Peak District National Park, a Sheffield theatre, including all entrance fees ; the use of the University Library, use of the University computer and of external computer-based services ; and a "Literature package" for retention by each student. The fee also includes accommodation and meals for the 7 days in London. The fee does not include travel from the country of origin to Sheffield and return from London, travel from Sheffield to London, and travel on visits of observation in and around London (about £5). It also does not cover the cost of meals during these periods of travelling and pocket money.

A number of fellowships is expected to be made available by Unesco and other organizations. Applicants selected for the course will automatically be considered for the possible granting of one of the available fellowships.

The University of Sheffield Postgraduate School of Librarianship and Information Science

The University, which received its Royal Charter in 1905, is one of the medium to large size universities in the United Kingdom. Its present full-time student population is approaching 7000 and its full-time academic staff 1000. The University comprises the Faculties of Arts, Pure Science, Medicine, Law, Engineering, Materials, Social Sciences, Architectural Studies, and Educational Studies, and covers the full range of academic studies from undergraduate level to post-doctoral research.

The Postgraduate School of Librarianship and Information Science was founded in 1963 as a department of the University and now has an international reputation for advanced education and training in both library and information science. It offers 3 taught Master's programmes, with about 60 full-time students, and in addition there are both full-time and part-time research students working for Doctor's and Master's degrees by thesis. The full-time teaching staff is 10, of whom 4 are graduates in science or technology, 4 in social sciences, and 2 in humanities. It is also the principal United Kingdom centre of its type for research in Library and information science, with 12 to 15 full-time research workers, including independent research workers and post-doctoral research fellows ; there are 4 major on-going research projects, two of which are in the computer-applications field.

Appendix B-1

ATTACH RECENT PHOTOGRAPH HERE.

UNIVERSITY OF LONDON

INSTITUTE OF COMPUTER SCIENCE

INTERNATIONAL POSTGRADUATE TRAINING COURSE

FOR

COMPUTER MANAGEMENT STUDIES

APPLICATION FORM

Note: This form is not to be used by candidates applying for Technical Assistance awards from the British Government.

A. DETAILS OF CANDIDATE

Family Name: ..... Given Names: .....

Date of Birth: ..... Place of Birth: .....

Nationality: ..... Sex: .....

Marital Status: ..... Home Address: .....

.....

.....

.....

B. EDUCATIONAL RECORD (from Age 16 years)

Educational Institution	Location	Years attended		Degrees, diplomas etc. awarded.	Subjects or fields of study.
		From	To		

C. PROFESSIONAL QUALIFICATIONS

Date obtained	Institution or Society	Grade of membership

D. EMPLOYMENT RECORD (In chronological order ending with present post; continue on separate sheet if necessary)

Post	Dates of service		Name and address of employer	Type of organisation	Brief description of duties
	From	To			

E. COMPUTER EXPERIENCE

Please indicate against the following headings the amount of experience that you have had in each e.g. None, course attended only, one year etc.

Programming in Assembler language .....

Programming in FORTRAN .....

Programming in ALGOL .....

Programming in COBOL .....

Other languages (please state) .....

Information Systems Analysis and Design .....

Computer management or administration .....

Indicate any other details of your computer experience that may be relevant to your application.

.....

.....

F. PROFICIENCY IN VERBAL AND WRITTEN ENGLISH

(For nationals of non-English speaking countries)

State evidence of proficiency and/or state willingness to be tested in accordance with the requirements specified in the Course Brochure.

.....

.....

.....

G. FINANCIAL ASSISTANCE

State the nature of any award, or grant or fellowship that you will be seeking to enable you to attend the course.

.....

.....

.....

.....

H. REFEREES

Provide the names and addresses of two persons who are prepared to support your application, one of whom should be the Head or a Senior member of your department. Alternatively a responsible person familiar with your current duties should be named.

1. Name: ..... 2. Name: .....

Address: ..... Address: .....

....

....

I. RELEASE FROM DUTY

(This section is to be completed and signed by your present employer)

I confirm that .....

(Applicant's Name)

if accepted for the International Postgraduate Training Course in Computer Management Studies, will be released from duty for the duration of the course.

Name: ..... Title: .....

Address: .....

Signature ..... Date .....

J. RETURN OF APPLICATION

On completion, this form should be signed below and returned to:

The Course Director,
Computer Management Studies,
Institute of Computer Science,
44 Gordon Square,
London, WC1H OPD.
England.

to arrive not later than 31 May 1973.

Applicant's Signature .....

Date ....

ROYAL MELBOURNE INSTITUTE OF TECHNOLOGY

WORKSHOP IN ENVIRONMENTAL INFORMATION SYSTEMS

MONDAY, JULY 15 - THURSDAY, JULY 18

PLACE : Kay House, 449 Swanston Street, Fifth Floor, (Library Services Division, Education Department, Victoria).

TIME : Morning Sessions 9.15 - 12.15, including morning tea break

Lunch 12.15 - 1.45 (Council Dining Room Ground Floor, Building 1, R.M.I.T.)

Afternoon Sess. 1.45 - 4.45, including afternoon tea break

Please note :

1. On Monday, July 15, registration will take place from 9.10 a.m. Morning tea will be served during that period.

2. At the conclusion of the Workshop on Thursday, July 18, participants are invited to attend a sherry party, to conclude at about 5.30 p.m.

Appendix C-2

Technisearch LIMITED

124 La Trobe Street
Melbourne, Victoria 3000
Phone: 345-2922
(Royal Melbourne Institute of Technology)
Extension:
Our reference:
Date:

10th July, 1974.

Dear Sir,

As yours is a group concerned with matters affecting conservation and the environment, you will no doubt be interested in the visit of Dr. Nasta Dosa, who is in Australia as the guest of Technisearch Limited and the Department of Librarianship, Royal Melbourne Institute of Technology.

1 VISIT OF INTERNATIONAL AUTHORITY:

i Workshop

Dr. Dosa, world authority in the field of environmental studies, will be conducting a 4-day *Workshop in Environmental Information Systems* from 15th-18th July. She has had extensive experience both in the United States (she is Associate Professor of Information Studies at Syracuse University, New York), and internationally, where she has lectured at and attended a number of conferences sponsored by bodies such as the United Nations and NATO.

[redacted] for more information you can ring either Mr. E. W. White or Miss J. Todd on 341 2532/3.

ii Public Meeting

There will be a *Public Meeting* for representatives from the trades unions and from community groups such as yours to hear Dr. Dosa and to take part in discussion with her. It will be held in the Trades Hall Council Chamber, at 2.30 pm on Monday, 22nd July. Dr. Dosa leaves for home the next day.

2 MAN AND HIS ENVIRONMENT: *SYMPOSIA*

During July and August there will be three *Symposia* at RMIT on the topic Man and His Environment. The speakers will be Government officials, academics, professional and businessmen. Each symposium will start at 1.30 pm, and will last 2-3 hours. The papers by the speakers will be followed by discussion in which we hope the audience will take part. The dates are as follows: Wednesday, 17th July, Wednesday, 24th July and Wednesday, 7th August; the venue is Storey Hall, 342 Swanston Street.

3 *EXHIBITION*

A British Council Exhibition of about 350 books and periodicals dealing with many aspects of pollution and the environment is currently on display in the RMIT Central Library. The Library is situated on the 1st Floor of the Casey Wing, Swanston Street. It is open 8.30am-9.55pm weekdays, and 12-5pm Sundays.

You are cordially invited to all or any one of these functions. I am enclosing a map of the RMIT for your convenience. We look forward to hearing from you.

Yours faithfully,

A W Jenkins

A. W. Jenkins,

124 La Trobe Street
Melbourne, Victoria 3000

Phone: 345-2822

(Royal Melbourne Institute of Technology)

Extension:

Our reference:

Date:

Technisearch LIMITED

Appendix C-

-List of Participants 15th July, 1974.-

WORKSHOP III ENVIRONMENTAL INFORMATION SYSTEMS.

1	M/s Patricia	ALONSO	RMIT Assistant to Dr. Dosa	
2	Mr Colin	BARRIE	Head, School of Art	RMIT
3	Mr A. R.	BEASLEY	Soil Consv'n Authority	
4	M/s A.	BEAUMONT	Technical Library	ACI
5	Mr L. J.	BEENS	Dept. Environm't & Consv'n	Canberra
6	Mrs Julia	CARLING	Hargrave Library	Monash Univ.
7	M Diana	CARR	Town & Country Plann'g Brd.	
8	Miss E.	CARVOSSO	Central Library	CSIRO
9	Mr T. W.	CHU	Faculty of Architecture	Melbourne Univ.
10	Mr I.	CRUMP	Central Library	CSIRO
11	Mrs. Penny	CUTLER	Preston Inst. of Tech.	
12	M/s M.	DAVIS	Centre for Envirmt'l Studies	Univ. of Melb.
13	Mrs. Pam	GIBSON	State College of Victoria	
14	Mrs. Agnes	GREGORY	Swinburne Institute of Technology	
15	Mr. Gordon	GRIFFIN	State Library of Tasmania	
16	M/s G. J.	GROOM	RMIT	
17	Mr. B. V.	HANOM	CSIRO	
18	Miss Barbara	HYNAM	Petroleum Information Bureau	
19	Dr Nicholas	HOLMES	Fisheries & Wildlife Division	
20	Miss J.	McALPIN	Ministry of Conservation	Canberra
21	Miss Julie	NSU	Research Dept.	State Library
22	Miss Diana	McLELLAN	La Trobe University	
23	Mrs Penelope	MORRIS	Dept. of Housing	
24	Mrs Gail	OSWELL	Australian Conserv'n Found'n	
25	Mr A. J. E.	PARK	Port Phillip Authority	
26	Mr Peter	RAVLINSON	Zoology Department	La Trobe Univ.
27	Mr Gary	SCOTT	State College of Victoria	
28	Mr J. A. (Tony)	SHAW	Dept. Environm't & Consv'n	Canberra
29	Mrs Leonie	SKEHAN	P. A. Management Consultants	Sydney
30	Mrs Janet	SMITH	Parliamentary Library	Parliament House
31	Miss Margaret	TRASK	University of NSW	
32	Miss Sandra	YOUL	Fisheries & Wildlife Division	
33	Mr Michael	WATSON	VictorianNational Parks Service	
34	Ms Ann	BERMAN	Environmental Protection Authority	
35	Miss Pamela	TAYLOR	University of New South Wales	

We gratefully acknowledge the assistance of the following:

Broken Hill Proprietary Limited, and
The Library Branch, Education Department of Victoria.

Technisearch,
12th July, 1974.

WORKSHOP IN ENVIRONMENTAL INFORMATION SYSTEMS

PROGRAMME

MONDAY
JULY 15.

9.00 - 10.00 a.m. Registration, morning tea.

10.00 a.m. BRIEF INTRODUCTION AND OVERVIEW. (Lecture)
A unifying approach to environmental information.

CURRENT AND POTENTIAL INFORMATION USERS. (Lecture)
Variations in frame of reference, attitude and method.
Information use studies : the state of the art.
Institutions and organizations as information seekers.
Individuals as information seekers :

- Users of technical and research data.
- Planners, policy makers, decision makers.
- Participating and potential publics.

1.45 - 4.45 p.m. INFORMATION USERS, COMMUNICATION AND CHANGE
Small group discussion.
(Statement attached)

TUESDAY,
JULY 16.

9.15 - 12.15 a.m. INFORMATION RESOURCES AND PROCESSES. (Lecture)
Bibliographic and other problems of access.
Institutions as information producers.
Information clearinghouses, data centers, services.
Specialized materials :

- Research-in-progress.
- Conference information.
- Translations.
- Patents.
- Impact Statements.

Innovative techniques :

- Information repackaging.
- Information counselling.
- People's networks, referral.

1.45 - 4.45 p.m. COMMUNITY NETWORK.
Case study and small group discussion.
(Statement attached)

WORKSHOP IN ENVIRONMENTAL INFORMATION SYSTEMS :

PROGRAMME (Contd.)

WEDNESDAY,
JULY 17.

9.15 - 12.15 p.m. THE INTERNATIONAL SCENE I (lecture)
National development, technology assessment and the quality of life.
Environmental education of the public; programmes in U.S. and Europe.

1.45 - 4.45 p.m. INVITED LEADERS IN ENVIRONMENTAL AFFAIRS
The following have accepted our invitation to take part in this session.

Dr. M.H.F. Raley, Co-ordinator, Master of Environment Science Course, Monash University.

Dr. W.J. McG. Tegart, Melbourne Research Laboratories, Broken Hill Pty. Ltd.

Prof. G. Seddon, Centre for Environmental Studies, University of Melbourne.

Mr. K. Tarrant, Australian Conservation Foundation.

Mr. P. Smith, Senior Air Quality Officer, Environment Protection Authority.

THURSDAY
JULY 18.

9.15 - 12.15 p.m. THE INTERNATIONAL SCENE II (lecture)
The United Nations Environment programme.
The International Referral System.
The role of non-governmental organization in national planning.
UNESCO and UNISIST.

1.45 - 4.45 p.m. PRESENTATIONS BY WORKSHOP MEMBERS
Informal reports on field experiences, reports on information services being used and developed.
Participants are asked to bring items which they have prepared solely for use in their own operations and which have not been published or widely distributed.

EVALUATION OF THE WORKSHOP EXPERIENCE

4.45 - 5.30 p.m. Sherry party.

Appendix C-6

THE INFORMATION USER

Small group discussion

Because of the great variety of information and data users in a cross disciplinary field, one is especially concerned with their background, orientation and specific information needs. Our collective experience with various user groups and their attitudes will add to our understanding of how to plan and use information resources.

Please discuss in your groups the following aspects :

1. What are some of the characteristic problems in assessing and evaluation user needs ?

2. What can information users do to improve communications (both oral and written) between themselves and those who (a) produce, (b) handle information resources ?

3. What can information professionals do to improve communications and services to users ?

4. Any other problem you may want to add.

Each group should develop one major theme and related recommendations. This will make our discussion more manageable.

DISCUSSION TIME : 1 hour 15 - 30 minutes.

Afterwards we will reassemble into the whole group.

Please select (a) a reporter and (b) a secretary for each small group.

The reporter will tell the whole group about the consensus of his/her small group.

The secretary will make an informal summary of the discussion and record problems and recommendations in addition to the major theme developed by his/her small group.

This will allow us to become aware of a great variety of problems and alternative solutions.

A COMMUNITY NETWORK FOR ENVIRONMENTAL INFORMATION

Your community has been selected by the "Victorian Information Planning Board" to serve as a model for the development of a co-operative environmental information network. The community received a grant to plan and design ways of co-operation to interlink existing institutions, agencies, organizations, libraries and other information facilities. The objectives are (1) to consider the total information flow in the community between sources of information and the users and (2) to innovate and strengthen existing facilities rather than create a new system.

The information facilities of the community have to submit proposals to the Board outlining and justifying their own role in the prospective network.

You are a member of a committee whose task is to receive and review proposals. This committee will have to study all types of agencies, organizations, and information centres and their role in the environmental network. Your task is to study and report to the Committee on the following :

1. To identify problems which currently stand in the way of effective co-operation, especially in regard to referral activities, (a) between all types of libraries and (b) between libraries and other agencies.

2. To recommend novel ways for interaction in order to co-ordinate, share and disseminate environmental information, both at the research and popular levels, for the benefit of the whole community.

3. Suggest ways this local system can be interlinked with a national and eventually with an international environmental information network.

* * * * * * *

To facilitate discussion and participation in this session, would participants please bring samples of published secondary services, such as indexing and abstracting services, newsletters, bibliographics, directories, etc. which they are using in their work.

Appendix D-1

EXAMPLE OF

Participant Evaluation Report

Your candid reactions to the course will help us plan future courses. Your comments need not be signed, but PLEASE return the completed form.

1. Please state your primary objective in registering for this course.

_____

2. Was this objective largely achieved through your participation in the course?

☐ Well Achieved ☐ Mostly Achieved

☐ Moderately Achieved ☐ Not Achieved

3. The topics which were MOST INTERESTING or most valuable for my purposes were:

_____

_____

4. The topics which were LEAST INTERESTING or least valuable for my purposes were:

_____

_____

5. What I liked most about the organization and procedure of the course was:

_____

6. A suggested change or improvement in organization or procedure would be:

_____

7. Do you have any suggestions for the improvement of the discussion process?

_____

EXAMPLE OF

Participant Evaluation Report (cont.)

8. What new topics might well be added when the next similar course is given?

_____

9. What changes would you recommend in the physical facilities, travel arrangements, meals, lodgings, length of course, schedules, etc.?

_____

_____

10. In general, how do you rate this course?

☐ Excellent ☐ Good ☐ Fair ☐ Poor

(Use the back of page for other comments.)

Appendix E

Sample Items in a Budget or Financial Report for a Course

Expenses:

- Honoraria for Instructors
- Travel Expenses for Instructors
- Travel Expenses for Organizing Committee
- Secretariat Expenses
- Production of Learning Materials (audiovisual, etc.)
- Rental Fees for Equipment and Audiovisual Materials
- Rental Fees for Meeting Rooms
- Charges for Translation or Interpretation Services
- Publication Costs for Printed Handouts, Evaluation Forms, Course Prospectus, etc.
- Meals and Refreshments for Participants
- Lodging for Participants
- Transportation Charges for Field Trips
- Scholarships for Participants
- Supplies (paper, books, folders, etc.)
- Communication and Telephone Costs
- Postage for pre- and post-course distribution of materials

Income:

- Registration Fees
- Sponsor Subsidy
- Government or Foundation Grant
- Meal and Lodging Assessments
- Scholarship Grants

SECTION I. Checklist for Organizing Committee

1. ☐ Have you written a preliminary statement of objectives

2. ☐ Have you set preliminary dates for meeting ?

3. ☐ Have you determined what type of course and how many people will attend ?

4. ☐ Have you estimated budget ? (See appendix for possible items to be included.)

5. ☐ Have you attained sponsorship ?

6. ☐ Have you tentatively decided on a meeting site ?

7. ☐ Have you assessed appropriations of facilities and availability of equipment at meeting site ?

8. ☐ Have you listed the sequence and the subjects to be covered in course ?

9. ☐ Have you chosen instructor (s) ? Other resource personnel, such as discussion leaders ? recorders ?

10. ☐ Have you determined qualifications of participants ?

11. ☐ Have you decided on language of instruction and length of course ?

12. ☐ Do you have an overall action plan and schedule of events from this point onward ?

SECTION II. Checklist for Organizing Course

13. ☐ Have you established a schedule for administrative tasks to be performed ?

14. ☐ Have you sent out preliminary course announcement ? Final course brochure ?

15. ☐ Have you reached agreement with training staff on course outline, learning activities, facilities and arrangements ?

16. ☐ Have you screened applications and sent acceptance letters with follow-up instructions ?

17. ☐ Have you distributed pre-course material (if any) to registrants ?

18. ☐ Have you confirmed facilities and equipment availability for course ? and living accomodations (if any) ?

19. ☐ Have you arranged for transportation ? Special dietary menus ? living quarters ?

20. ☐ Have you arranged for registration/hospitality on first day of course ?

21. ☐ Have you sent out press release ?

SECTION III. Checklist for Implementing the Course

22. ☐ Have you checked the rooms for the course to determine satisfactory ventilations, size, furniture, seating arrangements, etc. ?

23. ☐ Is the required equipment at the meeting site and in good working order ?

24. ☐ Have you assigned specific persons to the various supportive tasks ?

25. ☐ Have the arrangements for meals, refreshment breaks been confirmed ?

26. ☐ Have the instructors been briefed ? Are there any changes in time schedule of activities ?

27. ☐ Will the pace of instruction and sequence of learning activities be monitored for effectiveness ?

28. ☐ Are the handout materials pre-assembled and available on time and in sufficient quantities ?

29. ☐ Have welcoming and departure arrangements been made final ?

Appendix D-4

SECTION IV. Checklist for Post-Course Activities

30. ☐ Have you decided on the proper form for evaluation of the course ? of the instructor ? of the participants ?

31. ☐ Have you collected and analyzed evaluative data ?

32. ☐ Have you written and used the evaluative report ?

33. ☐ Have you prepared post-course reports to sponsor ? to participants ? Have participants produced reports ?

34. ☐ Have you distributed post-course materials ?

35. ☐ Have you sent a letter of appreciation to instructors ?